United States
Office of Personnel Management

Electric Accounting Machine Project Planning Series

GS-0362

Workforce Compensation and Performance Service
Office of Classification Programs
December 1997, HRCD-4

Electric Accounting Machine Project Planning Series

GS-0362

CONTENTS

This series includes all classes of positions the duties of which are to plan or supervise the planning of the work process and sequence of steps involved in recording and processing data by means of electric accounting machines (mechanical tabulating equipment, unit record machines). Also included in this series are certain positions which involve both planning or supervision of planning work and also responsibility for supervising, administering, or directing an electric accounting machine program or organization.

This standard cancels and supersedes the standard for the Electric Accounting Machine Project Planning Series, GS-0362, issued in February 1961.

A. General statement

The term "electric accounting machine" is abbreviated to "EAM" in subsequent parts of this standard. Any of the class titles authorized in this standard may be similarly abbreviated for all official purposes.

EAM* equipment is one of two principal means for processing large volumes of data mechanically. The other principal means, discussed under Exclusions, is digital computing equipment.

The EAM function is used for but is not limited to: converting basic data from other forms to the processing medium (i.e., the punch cards); automatically transcribing data to punch cards from other punch cards or from other media (e.g., telegraphic tape); transcribing data from punch cards to other cards or media; transferring data from a report printed by punch card machine to another report form; processing data recorded on punch cards through a large variety of mechanical processes, such as sorting, counting, calculating, and punching additional data in the card; and printing reports.

Positions included in this series require a knowledge of the machines and equipment, their mechanical processes, and operating characteristics in order to plan and to control operations which include the development of EAM processing programs, conversion of data to forms suitable for mechanical processing, and the mechanical and related clerical steps in the EAM process from raw data to finished product.

B. Exclusions

1. Positions the principal duties of which are to administer, supervise, or perform

primarily machine operation work involved in recording and processing data by means of EAM machines are classified in the Electric Accounting Machine Operation Series, GS-359.

2. Positions the paramount requirements of which are experience and proficiency in a subject-matter area rather than in planning the machine and clerical processes and work steps involved in recording and processing the subject-matter data by means of EAM equipment are classified in whatever series is appropriate for the particular subject matter involved.

3. Positions which are principally concerned with the management, planning for, supervision, or operation of digital computer equipment are classified in the Computer Operation Series, GS-332, or the Computer Specialist Series, GS-334, whichever is appropriate for the work performed.

4. Positions the principal duties of which are to develop work methods, procedures, and reporting systems which require a knowledge of management theory which is applied to a broader range of organizational entities and functions than just EAM units and EAM operations, are classified in the Management Analysis Series, GS-0343.

5. Positions the principal duties of which include the operation, maintenance, or administration of one or more administrative control systems, services, processes, or functions which apply more widely than just to EAM units or EAM operations are classified in the Management Clerical and Assistance Series, GS-0344.

Additional information which is helpful in distinguishing EAM from computer equipment is published in the Position Classification Standard for the EAM Operation Series, GS-359, and in the published standards for the computer occupations.

PAGE 3, 1/82, TS-59

C. Supervising planner positions

The authorized title for supervisory planner positions is "Supervisory EAM Project Planner." This title should be used for any planner positions which include significant and continuing supervisory duties and responsibilities over EAM project planning work.

D. EAM program supervisor positions

The authorized title for positions which involve planning or supervision of planning work of Category II or III as described below, and also responsibility for supervising, administering or directing an electric accounting machine program or organization is

"Electric Accounting Machine Program Supervisor."

SERIES CLASSIFICATION AND TITLING OF POSITIONS IN ELECTRIC ACCOUNTING MACHINE ORGANIZATIONS

Certain work involved in EAM operations is characteristic of both the EAM Operation Series, GS-0359, and this series and is, therefore, a potential cause of confusion as to the proper series or title for some specific positions. The following paragraphs describe the proper series and title for the various combinations of work:

1. The substantially full-time supervision or performance of machine operations is classified in the EAM Operation Series, GS-359, with the title of EAM Operator, Lead EAM Operator or EAM Supervisor, as appropriate.

2. The substantially full-time supervision or performance of EAM project planning of any category described in this standard is classified in the EAM Project Planning Series, GS-0362, with the title of EAM Project Planner or Supervisory EAM Project Planner, as appropriate.

3. Positions which include the supervision or performance of project planning work of Category II or III, as described in this standard, are classifiable in the EAM Project Planner or Supervisory EAM Project Planner, as appropriate. However, if supervision over machine operations is also included, the proper title is EAM Program Supervisor.

4. Positions which involve supervision or performance of machine operations and also the supervision or performance of project planning work of Category I, as described in this standard, must be classified as to series on the basis of the paramount nature and objective of the positions and the trend of the career ladders in which the positions are located. When the paramount characteristic of the positions is the operation of EAM equipment to produce machine products, and the career ladder tends to be oriented toward machine operation and supervision, the positions are classifiable in the EAM Operating Series, GS-0359, with the title of EAM Operator or Supervisory EAM Operator, as appropriate. However, when the paramount characteristic of the positions is the preparation of project plans, and the career ladder tends to be oriented toward project planning, supervision of project planning, or program supervision, the positions are classifiable in the EAM Project Planning Series, GS-0362, with the title of EAM Project Planner or Supervisory EAM Project Planner.

THE EVALUATION OF SUPERVISORY POSITIONS

Both "Supervisory Project Planner" positions and Program Supervisor positions are properly classified in the EAM Project Planning Series, GS-0362. However, the grade level standards are not directly applicable to such positions. The combinations of duties and responsibilities assigned to those positions vary so widely that there is no single practical approach to their evaluation. The Supervisory Grade Evaluation Guide, Part II, is appropriate for the "Supervisory Project Planner" positions. The evaluation of program supervisor positions will require the application of the following:

(1) the standards for the EAM Project Planning Series, GS-0362, to evaluate the program elements of the positions; and

(2) the Supervisory Grade Evaluation Guide, Part II, to evaluate the supervisory responsibilities.

PAGE 5, 1/82, TS-59

OCCUPATIONAL INFORMATION

The Position Classification Standards for the EAM Operation Series, GS-0359, contain much occupational information which is also applicable to this series.

A. Elements of the planning function

Planner positions can be grouped into three basic categories or work situations on the basis of the depth of involvement in the planning process. These may be identified as follows:

Category I. -- Detailed machine planning for approved projects; planning procedures and preparing job orders, manuals, and other instructions necessary to guide the machine operators. The planning may be for new projects or may involve improvement of existing procedures but is essentially the same in either case.

Category II. -- Project planning which combines detailed machine planning with responsibility for integrating the planned work with the other work performed in the specific machine unit, utilizing the existing staff and equipment.

Category III. -- Project planning which may include planning the types described in the other two categories, but which also involves participation in a staff capacity in the overall management of the EAM program, e.g., by making project feasibility studies, analyzing staffing and equipment needs, planning the distribution of EAM functions to subordinate EAM units, etc.

The planning function is comprised of nine major elements. The combinations and degrees of these elements which are usually found in each of the categories are described in the following chart. These descriptions, however, are merely guides which portray three degrees of responsibility for, or involvement in project planning. Not one of these category descriptions is likely to match any individual planner position precisely. It is not necessary that any position must include every responsibility (and/or in the same degree) listed for a category in order to be properly evaluated as being in that category. Rather, each category description should be considered to be more nearly an overall picture of a level of work and responsibility. The category description, therefore, is not intended to represent either the minimum or the maximum but the midpoint of a range of duties and responsibilities. Individual project planner positions must then be evaluated in whichever of the three categories most nearly fits on an overall basis. The fact that a particular position may somewhat exceed or fall short of the specific description of a category should be balanced with other relative strengths and weaknesses of the position in other respects in order to arrive at a final grade level.

PAGE 6, 1/82, TS-59

Elements 7, 8, and 9 are each specializations which sometimes constitute entire planner positions or are optional elements in planner positions. Although some of these elements could, in part, be limited and therefore be a part of the planning work described in Category I or Category II, they are usually associated with planner positions which are more nearly of the level described as Category III.

Element 1. Planning:

(a) Obtaining Source Material. This includes liaison with the customer who provides documents which will be the basis for information provided to the machine unit and who specifies the due dates for submission. -- CHARACTERISTIC OF CATEGORY I, II, AND III.

(b) Outlining procedures for converting the source material to the basic punch card. This includes determining whether revision in the existing source material or development of new data are required. It also includes designing new card forms if data required are not available on existing cards, developing codes for punching purposes for the specific project, and determining whether that coding is to be done by subject-matter personnel, control clerks, EAM operators, or others. -- CHARACTERISTIC OF CATEGORY I, II, AND III.

PAGE 7, 1/82, TS-59

(c) Drafting written or other procedures for machine and clerical steps. This includes any or all of the following: (1) preparing flow charts or other media to show the flow of punching, mechanical, and clerical operations and to designate the type of EAM

equipment to be used and the sequence of machine steps; (2) writing or otherwise preparing instructions covering step-by-step methods for mechanical and clerical processing in the machine unit; (3) preparing diagrams for panel wiring; (4) determining the format for tables, listings, or reports to be produced. -- CHARACTERISTIC OF CATEGORY I, II, AND III.

(d) Devising a procedural control system. This includes selecting the technique, procedures, and forms needed to maintain control over the production status and to provide checks and balances to ensure accuracy of results (This covers audit of source data.); providing for and maintaining various production control media, such as checkout lists or ledgers, which indicate scheduled production as compared with actual production data; and providing for various accounting and statistical controls, such as audit steps during the processing stage, methods used to balance totals against previous reports and control ledgers, if appropriate. -- CHARACTERISTIC OF CATEGORY I, II, AND III.

(e) Incorporating the individual assignments into broad overall schedules and priorities of work, considering primarily the requirements of the customers and the capabilities of the machine unit. -- CHARACTERISTIC OF CATEGORY II AND III.

PAGE 8, 1/82, TS-59

(f) Determining the format of feeder reports to be submitted by other machine units. -- CHARACTERISTIC OF CATEGORY II AND III.

(g) Setting due dates for submission of information (raw data, punch cards, or feeder reports from subordinate machine units) to the machine unit. -- CHARACTERISTIC OF CATEGORY II AND III.

(h) Estimating machine, personnel, and space requirements for the project in the machine unit or units. -- CHARACTERISTIC OF CATEGORY II AND III.

Element 2. Liaison:

(a) Meeting with the customer throughout the planning phases to advise of the best method of accomplishing the specific approved project, to report procedural difficulties in obtaining results from the raw data or data already transcribed onto punch cards, and to work out agreements regarding timing of the several step, workflow, quality, etc. -- CHARACTERISTIC OF CATEGORY I, II, AND III.

(b) Meeting with other management service specialists in order to report and discuss specific details of the individual project which may affect other management needs. -- CHARACTERISTIC OF CATEGORY I, II, AND III.

(c) Contact with the customer to develop source material (determining whether existing documents will provide the basic information, revisions are required in source material, or new raw data will have to be developed), to reach agreement on scheduling which is acceptable to the customer and which can be accommodated to the scheduling of other machine unit projects, and to prepare cost studies. -- CHARACTERISTIC OF CATEGORY II AND III.

PAGE 9, 1/82, TS-59

(d) Collaboration with other management service organizations in order to work out problems involved in dovetailing the assigned project with other managerial requirements when the project involves the participation of other organizations; for example, for the submission for raw data by the format and within the time limits necessary to fit the project into the established capacity and schedule of the machine unit. -- CHARACTERISTIC OF CATEGORY II AND III.

Element 3. Technical control over implementation:

(a) Arranging for and overseeing test machine runs to ascertain that customer needs are met and that the planning has been accurate and complete. -- CHARACTERISTIC OF CATEGORY I, II, AND III.

(b) Assisting and advising operating personnel in preparing detailed mechanical and clerical procedures and work schedules not previously planned. -- CHARACTERISTIC OF CATEGORY I, II, AND III.

(c) Wiring control panels. -- CHARACTERISTIC OF CATEGORY I, II, AND III.

(d) Assisting in the installation of new projects or revised procedures by conducting training for operators. -- CHARACTERISTIC OF CATEGORY II AND III.

PAGE 10, 1/82, TS-59

(e) Explaining forms and difficult procedures. -- CHARACTERISTIC OF CATEGORY II AND III.

(f) Inspecting and evaluating processes and techniques employed in the machine unit, including making surveys and inspections of subordinate units. -- CHARACTERISTIC OF CATEGORY II AND III.

(g) Reviewing (periodically or continually) existing projects to measure adherence to reporting requirements. -- CHARACTERISTIC OF CATEGORY II AND III.

Element 4. Cooperating with EAM production supervisors:

(a) Establishing and maintaining progress and production records for specific products. -- CHARACTERISTIC OF CATEGORY II AND III.

(b) Evaluating efficiency of specific machine unit operations, identifying areas of deficiencies and recommending measures for improvements. -- CHARACTERISTIC OF CATEGORY II AND III.

Element 5. Making recommendations for the machine unit (on the basis of planning for individual projects):

(a) Recommendations regarding mechanical feasibility after analyzing the desired report and the capabilities of the available machines. -- CHARACTERISTIC OF CATEGORY II AND III.

PAGE 11, 1/82, TS-59

(b) Recommendations regarding operational costs, establishing workload requirements for each machine type and estimating manhours, and material and machine costs for a specific project. -- CHARACTERISTIC OF CATEGORY II AND III.

Element 6. Making recommendations for the data-processing program (other than on the basis used for Element 5):

(a) Recommendations involving consideration of economic feasibility including estimating savings by mechanization in place of manual or other processing. -- CHARACTERISTIC OF CATEGORY III.

(b) Recommendations regarding extent of centralization (or decentralization) and the type and extent of processing to be required of each machine unit or units in each of more than one organizational echelon. -- CHARACTERISTIC OF CATEGORY III.

(c) Recommendations regarding the project planning required and whether the procedures should be planned by the planning group, operating group, or by machine units at lower organizational echelons. -- CHARACTERISTIC OF CATEGORY III.

(d) Recommendations dealing with the effect of proposed projects in terms of effect on existing or proposed mechanization. -- CHARACTERISTIC OF CATEGORY III.

(e) Recommendations involving consideration of the effect of proposed regulations on existing or proposed mechanization. -- CHARACTERISTIC OF CATEGORY III.

PAGE 12, 1/82, TS-59

Element 7. Investigating machines, processes, and techniques:

(a) Evaluating new machines and related equipment and techniques developed by equipment manufacturers. -- CHARACTERISTIC OF CATEGORY III.

(b) Developing new processing techniques, procedures, forms, and organizational and functional patterns for machine units. -- CHARACTERISTIC OF CATEGORY III.

(c) Reviewing procedures in use to identify possible areas for improvement and to insure adherence to reporting requirements. -- CHARACTERISTIC OF CATEGORY III.

(d) Developing standardized methods for large-scale projects which promote large-scale savings. -- CHARACTERISTIC OF CATEGORY III.

(e) Solving existing machine processing problems, including trouble shooting for specific problems. -- CHARACTERISTIC OF CATEGORY III.

Element 8. Assisting EAM supervisors or operating officials:

(a) Preparing or reviewing budget estimates for machines and accessories. -- CHARACTERISTIC OF CATEGORY III.

(b) Preparing or reviewing justifications for new or additional equipment. -- CHARACTERISTIC OF CATEGORY III.

(c) Evaluating machine utilization in order to improve scheduling, justify machine purchase costs, and to spot lost-time problems. -- CHARACTERISTIC OF CATEGORY III.

PAGE 13, 1/82, TS-59

(d) Determining the machine requirements by type and number. -- CHARACTERISTIC OF CATEGORY III.

(e) Preparing overall instructions regarding machine utilization, accounting, and reporting. -- CHARACTERISTIC OF CATEGORY III.

Element 9. Planning a data processing system:

(a) Recommending the number and location of machine processing units required and their organization, staffing, equipment, functions, service areas, etc. -- CHARACTERISTIC OF CATEGORY III.

B. Degrees of processing complexity:

EAM project planning assignments can be grouped into three broad degrees of processing complexity. These may be identified as follows:

1. Limited processing complexity. -- The complexity of the planning is limited because the assignments have such characteristics as:

(a) similarity to other existing projects from which plans may be adapted;

(b) the relatively ready availability of the required data in a relatively usable form;

(c) the mechanical processing itself involving several machines and a variety of processing steps which are relatively routine in nature;

(d) the processing being restricted to a single machine organization (i.e., not a number of dispersed field units) and the data being normally supplied through a single source;

PAGE 14, 1/82, TS-59

(e) the subject matter of the project involving difficult, but not unprecedented, problems of adaptation to machine processing, determinations of mechanical feasibility, estimating of cost and time factors and equipment needs, etc.;

(f) the nature of the consumer's clerical or other operations being such that the needs engendered by a change to mechanical processing typically require adaptive changes in that operation, but not major redesign of those operations or methods;

(g) the proposed or contemplated work being within the normal workload capacity of the machine unit and presenting no unusual problems of scheduling, timing, or adjusting of relative prioriHes of the overall workload;

(h) no especially difficult, unusual, or delicate negotiatory problems being anticipated or encountered, or if they are encountered, special advice and assistance being provided by the supervisory or other employee in a higher graded position;

(i) the wiring diagrams to be developed being relatively simple and involving well-known techniques.

2. Average processing complexity. -- The complexity of the planning is "average" because the assignments usually have such characteristics as:

(a) dissimilarity to other previously planned projects and therefore a relative

absence of close and useful precedents;

(b) the presence of a need for planning how and in what form to obtain the necessary raw data, and how to translate these into a useful form for the machine unit;

(c) the wide variety and number of machine operations which are necessary, a significant proportion of which being of a nonroutine nature;

(d) the volume of data and number of cards to be processed, being large, necessitating extensively detailed plans and charts, and provision of numerous controls and checks to insure the accuracy of the processing;

PAGE 15, 1/82, TS-59

(e) the wiring diagrams to be developed being difficult and intricate involving many hubs, wires, and pins in the normal range and variety of combinations and involving some techniques and wiring combinations which are not in common use.

3. Unusual processing complexity. -- The complexity of the processing is unusual because the assignments have such characteristics as:

(a) the mechanical processing itself including very difficult, novel, or unprecedented problems as well as requiring a wide variety of machines and a large number or variety of processing steps;

(b) the mechanical processing being done in more than one machine organization (e.g., in a central unit and several field units) involving difficult problems of coordinating the work, adjusting the processing instructions to fit varying local needs and providing adequate controls and checks;

(c) the nature of the data to be used or developed being unusual and their sources and means of presentation being varied;

(d) the subject matter of the project involving especially difficult or novel and unprecedented problems of adaptation to machine processing, determination of mechanical feasibility, estimating of cost and time factors, and determining of equipment needs, etc.;

(e) the nature of the consumer's operations being such that the change to mechanical processing requires extensive changes and often major redesign of those operations or methods;

(f) the number, complexity, and unusual nature of the controls and checks which

must be devised and scheduled to insure the accuracy of the processing being great;

(g) the proposed or contemplated work involving the integration of the project into a total workload schedule which taxes (or with the proposed work, exceeds) the capacity of the machine organization or requiring the integration of a project which involves an unusually large and complicated series of processing steps when, in either case, there are present unusually difficult problems of scheduling, timing, and adjusting of the relative priorities of the overall workload;

PAGE 16, 1/82, TS-59

(h) the negotiatory problems being difficult, unusual, or somewhat delicate, with successful accomplishment being of significant importance to either the operating or the machine processing organization.

USE OF THE STANDARD

Ge several grade level discussions which follow utilize the interrelationship between the factors of the category of planning, the degree of processing complexity, the nature of personal work contacts, and the nature of job controls to distinguish one grade level of work from another. The most commonly occurring combinations of those factors are specifically described. The standard may be readily extended or projected to provide for the appropriate evaluation of other combinations of those factors, some of which may be properly classified in a grade higher than is described in this standard.

ELECTRIC ACCOUNTING MACHINE PROJECT PLANNER GS-5

GS-0362-5

1. Nature and variety of work:

(a) Some positions are those of project planners who perform detailed machine planning of the type described as Category I in connection with assignments which are of limited processing complexity. The assigned projects (or parts of projects) are either recurring reports or consist of special or one-time jobs.

(b) Other positions are those of project planners receiving training in any of the work described at the GS-7 level. Assignments for such positions are typically selected to provide the breadth and depth of training and experience essential for successful performance at a higher level. Supervisory guidance, instruction, and

assistance is provided to assure the most effective possible development during the training period.

PAGE 17, 1/82, TS-59

2. Personal work contacts

Contacts are primarily to obtain factual information needed to plan for approved projects, to solve minor EAM operational difficulties, or to impart information and interpretation of easily understood and well-established procedures. For example, the planner confers with the customer to discuss purpose, use, and exact requirements of the desired report or study and to obtain information as to sources of data and methods for transmitting these to the machine unit. In type (b) positions these contacts are more irregular and infrequent, but in type (a) these contacts are a regular and necessary part of the work. (Additional information on work contacts is included in the description of the elements of planning.)

3. Job controls:

The planner with assignments of type (a) receives supervisory guidance during work performance and at completion of each assignment the work is carefully reviewed.

The trainee planner in positions of type (b) receives specific and detailed instructions for each assignment. On-the-job and classroom training includes instructions in the techniques and methods for developing procedures and solving advanced wiring problems. Work is reviewed at various steps during the work process for accuracy, adequacy of planning methods, completeness and clarity of written instructions, and the efficient utilization of machines and personnel.

Both type (a) and (b) planners receive specific instructions and each is guided by regulations and established procedures governing the EAM planning for the kind of project planning work usually undertaken by him or her.

4. Qualifications requirements:

The GS-5 planner must have the ability to:

(1) acquire and apply the knowledge of the functions and operational theory of the machines in planning projects of limited complexity;

(2) acquire and apply a general understanding of the subject matter and processing steps involved in the assigned projects;

PAGE 18, 1/82, TS-59

(3) comprehend complicated instructions and convey these to others;

(4) perform necessary liaison in order to secure and transmit information from and to both customers and EAM operators; and

(5) employ resourcefulness, ingenuity, and sound judgment in identifying and solving planning problems.

ELECTRIC ACCOUNTING MACHINE PROJECT PLANNER GS-7

GS-0362-7

1. Nature and variety of work

(a) Some positions include detailed project planning work of the type described as Category I on page 5 in connection with assignments of average processing complexity. The assigned projects are either recurring reports or consist of special or one-time jobs.

(b) Other positions include project planning work of the type described as Category II in connection with assignments of limited processing complexity. Assignments to positions of this type are usually recurring reports, although some special or one-time jobs may require the same kind and level of planning duties and responsibilities.

2. Personal work contacts:

The nature of contacts, in general, are similar to the types of contacts with customers and EAM operators discussed at GS-5. The contacts at this level include explanation of factual information discussion of problems of a recurring and routine type, only infrequently involving novel situations and solutions.

For example: incumbents of type (a) positions have contacts with EAM supervisors and operators, and less frequently with customers, concerning detailed instructions or difficulties encounter, or, in the case of other and more frequent consultations with customer personnel, clerical details; and incumbents of type (b) positions have more frequent contacts with customers on the possible revising of either existing mechanical procedures or the customer's reporting operation, and with the EAM supervisor on scheduling such changes.

Additional information on work contacts in both types of positions in included in the

description of the elements of planning.

3. Job controls:

The planner receives written or oral instructions which usually cover the scope and purpose of the assignment, the project requirements, and the nature of the data to be processed. The supervisor is available for technical advice on the most difficult reporting processes, feasibility aspects (if applicable), of extremely complex wiring problems. Within the work assignment, however, the planner has a high degree of independence for decision and action and detailed work steps are seldom reviewed. The work of a planner at the conclusion of a work assignment is reviewed for adequacy of proposed mechanical and clerical control methods, overall feasibility, utilization of machines and manhours, and adherence to established policies and procedures.

4. Qualification requirements:

The GS-7 planner must possess:

(1) knowledge of the functions and operational theory of electric accounting machines;

(2) ability to plan projects of average processing complexity to assure the quality and effectiveness of their execution;

(3) ability to comprehend the overall processing schedule and problems of the machine unit, and to integrate new projects into the operations and schedule of that unit;

(4) ability to acquire and apply a general understanding of subject matter involved in the assigned project;

(5) initiative, resourcefulness, and judgment;

(6) ability to communicate effectively with machine operators, and supervisors, with customers and with EAM program supervisors.

PAGE 20, 1/82, TS-59

ELECTRIC ACCOUNTING MACHINE PROJECT PLANNER GS-9

GS-0362-9

1. Nature and variety of work:

(a) Some positions include detailed project planning work of the type described in Category I in connection with assignments which are of unusual processing complexity. The assigned projects normally result in large-scale recurring reports and for this reason require considerable planning expertise although some special or one-time projects may require this high degree of planning competence.

(b) Some positions include project planning work of the type described as Category II in connection with assignments of average processing complexity. Assignments in positions of this type are usually recurring reports, although some special or one-time projects may require the same kind and level of planning duties and responsibilities. The work assignment has such characteristics as: (1) the need for individual projects to be coordinated through several machine sub-units or several supervisors of machine operations; (2) the need to integrate the project into a total workload schedule which taxes the capacity of the machine organization which consists of several sub-units, or to integrate projects which involve an unusually large and complicated series of processing steps, when, in either case, there are present unusually difficult problems of scheduling timing, and adjusting of the relative priorities of the overall workload; (3) the project involves types of equipment or operations which are new, or for which there is inadequate prior experience, and present difficult problems of estimating needs, time, cost, or similar requirements; (4) the project involves machine processing in more than one machine organization (e.g., in a central unit and several field units), requiring the provision of the several units involved.

(c) Other positions include project planning work of the type described as Category III in connection with assignments which are of limited processing complexity. The assigned projects usually result in recurring reports but also included are special or one-time jobs of similar difficulty and complexity.

PAGE 21, 1/82, TS-59

2. Personal work contacts:

For Type (a) positions:

The contacts are the same in general nature as are described at GS-5. The contacts at the level include explanation of factual information and discussion of problems of a nonroutine, nonrecurring nature and frequently involve novel or unprecedented problems. The statements made by the GS-9 planner are more final in nature, for example, in planning technical details involved in combining related projects, or regarding the details of installation of a new, approved project.

For Type (b) positions:

The contacts are of the same general nature as at GS-5. The contacts at this level include explanation of factual information and discussion of controversial or complex matters. Statements made by the planner or individual problems of well-defined character but requiring interpretation and application of established operating policies are final, but on special, not well-defined matters, the planner does not speak with final authority.

An example of the contacts of planners in the type (b) position is to coordinate procedures among several EAM units and confer with subject-matter specialists and EAM supervisors at each of one or more subordinate echelons, instructing and explaining changes proposed in a complicated headquarters report involving field feeder reports.

For Type (c) positions:

The contacts are for a broader range of purposes, and commence at an earlier stage of project consideration, than is true in positions of types (a) and (b). The planner in the type (c) position confers with customers and prospective customers on all aspects of the assigned project from the initial consideration of the desirability and feasibility of mechanical processing; planning of the data gathering, processing, and reporting details; through any subsequent revisions, (()) or adjustments in the work. The planner in this type of position also deals extensively with EAM operators and their supervisors in installing new projects or procedures, solving problems they have encountered, seeking information to improve the efficiency or flexibility of a project, and similar purposes.

PAGE 22, 1/82, TS-59

Additional information about work contacts in all three types of positions is included in the descriptions of elements of planning.

3. Job controls:

The GS-9 planner receives general instructions regarding the scope and purpose of the assignment, results desired, deadlines or priorities, and the general nature of specific projects or programs. The employee plans and works independently on projects while reporting periodically to the project leader or supervisor on work status or on the most difficult problems. The work is reviewed, in the case of type (a) positions, for adherence to established policies and procedures and technical adequacy of the total project or projects; in the case of type (b) and (c) positions, for adherence to established policies and procedures, objectives, adequacy of procedures and control systems, effect of recommendations upon the work of other components, and costs.

4. Qualification requirements:

In addition to those qualifications required at GS-7, the GS-9 planner must have:

(1) ability to plan the mechanical details of very complex projects so as to assure the quality and effectiveness of their executions;

(2) ability to integrate larger and more complex projects into the more complex schedule of a larger and more heavily burdened machine unit;

(3) ability to conduct project feasibility studies and to adapt manual or other operations to EAM processing; and

(4) ability to make difficult studies of machine, manpower, and financial needs for machine processing work.

PAGE 23, 1/82, TS-59

ELECTRIC ACCOUNTING MACHINE PROJECT PLANNER GS-11

GS-0362-11

1. Nature and variety of work:

Included in this level are positions which include project planning work of the type described as Category III in connection with assignments which are of average processing complexity. The assigned projects usually result in recurring reports and for this reason require a higher degree of planning expertise, but also included are special or one-time jobs of similar difficulty and complexity.

2. Personal work contacts:

In addition to the contacts with the customer for the purpose of explaining factual information and discussing controversial or complex matters, the GS-11 planner has extensive contacts with management officials in the agency. Such contacts are characterized by discussions of complex problems which require the planner to comprehend the viewpoints of both the customer and the machine unit(s). As an EAM technical advisor the planner deals with top management officials regarding the mechanical feasibility of their proposals and also points out to the supervisor the possible effect upon the operation of the machine unit(s) should proposed plans of the customer be accepted. On occasion, the planner may represent the agency on matters where the participation or service of other agencies or organizations is concerned on projects or EAM operations generally.

3. Job controls:

The planner receives general instructions as to objectives of assignment. The planner normally decides the approach to be taken and executes the work, referring only unusual problems to the supervisor. Applying such additional guides as the effects of recent legislation on established reporting policy, the planner prepares completed staff studies for approval. Review of the work is for conformance with policies, propriety of the techniques used, and soundness of conclusions.

PAGE 24, 1/82, TS-59

4. Qualification required:

In addition to those qualifications indicated at the lower grades, the planner must have the ability to confer with top management officials on difficult and complex matters in effecting working agreements and in providing mechanized reporting services.

ENDNOTE

* - Includes certain electronic circuitry. In this standard the word "machine" and "equipment" are used interchangeably and are considered to be synonymous.